



Garden Route & Klein Karoo Visitor Trends January – June 2024

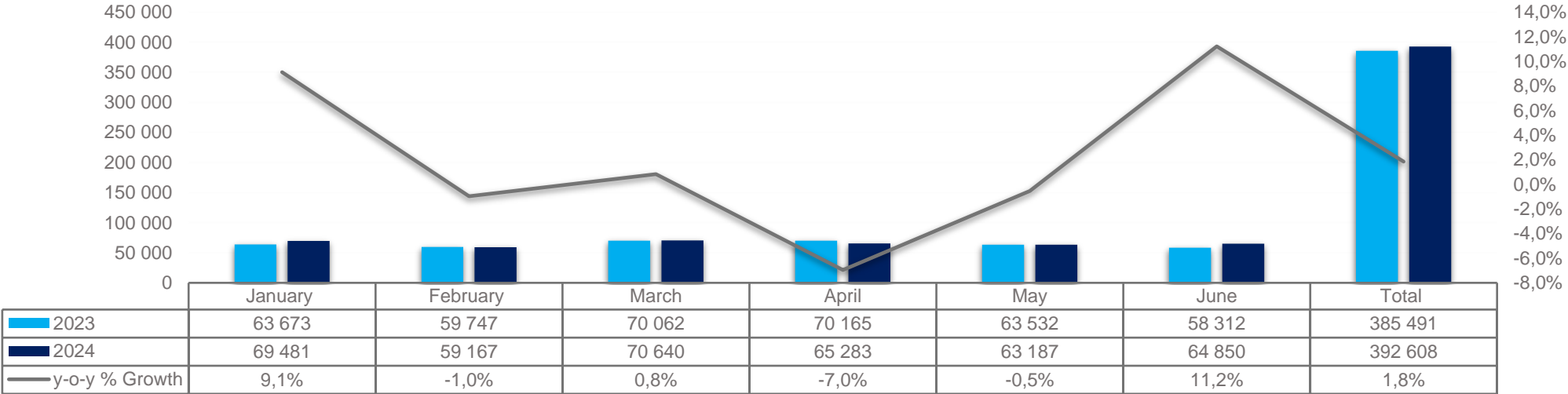
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1. George Airport Passenger Movement

- According to Airports Company South Africa (ACSA) 2024, more and more visitors are travelling to George.
- Attracted by the region's mountains, beaches and forests, George Airport now welcomes over 700,000 passengers each year.
- Between January and June 2024, the airport received a total of 392,608 arrivals, a positive year-on-year increase of 1.8% when compared to the same period in 2023.
- The increasing popularity of the region as a tourist destination is boosting traffic to the area, as shown in Figure 1 below. In 2024, the most popular months to travel were March with 70 640 passengers and January with 69 481 passengers.

Figure 1: Two-way Passenger Movement Through George Airport, Jan–Jun 2024



Source: Airports Company South Africa (2024)

An aerial photograph of a coastline featuring a prominent mountain range in the background and a large body of water in the foreground. The mountains are rugged and layered, with some peaks appearing more distinct than others. The water is a deep blue, and the sky is a pale, clear blue. The overall scene is serene and scenic.

Garden Route & Klein Karoo Visitor Trends & Patterns

Mobile Location Data Insights

2. GR & KK Mobile Location Data Insights: Methodology

What is mobile location data?

- This is Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they opt in, then their phone collects data and shares it with the publisher companies.
- All data collected is anonymised and does not include any personally identifiable information.

Why use mobile location data insights?

- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six regions.
- Mobile location data serves as a sample. It does not represent 100% of visitors, and it should not be treated as such. Like any sampling method, it can be subject to biases or lack of volume.

Factors influencing the International and Domestic Sample Counts:

The volume of mobile location data capture counts is influenced by several factors including but not limited to:

Data Source Variability

- Changing volume of mobile applications collecting and sharing data
- Data privacy and regulatory changes affecting sharing of data (GDPR, mobile OS policy changes etc.)

Data Collection and Processing Variability

- Mobile network and internet connectivity
- Mobile infrastructure technical issues (hardware failures, solar flare activity)
- Tourist logic to segment tourist from non-tourist mobile devices

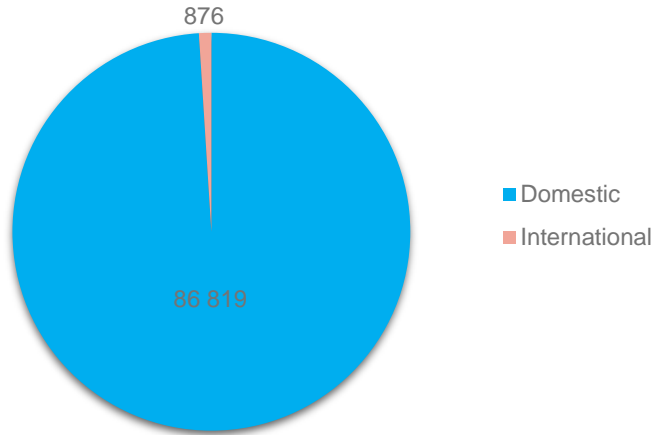
Mobile Use Variability

- Tourists disabling data transmission services due to high international data costs
- Tourists not using partnership apps as often.

While all mobile devices are affected by above, International mobile device counts are affected more than Domestic mobile devices when it comes to both mobile use fluctuations and data privacy restrictions. Tourists use their phones differently when travelling internationally – they may want to avoid additional out of country fees and only use their phone through wi-fi service. Tourists may not use the partnership apps they normally do while on extensive holiday. Restricting data privacy laws are also affecting the international landscape affecting data that can be shared which may affect processing that identifies tourists.

3. Garden Route & Klein Karoo Data Insights

Figure 2: Sample Size of Domestic and International Visitors, Jan–Jun 2024



- The insights in this report represent mobile location data from a sample of 86,819 domestic and 876 international tourists who visited the Garden Route and Klein Karoo between January and June 2024.
- Figures 3 and 4 show that within the domestic data set, 28,271 of the sampled tourists were from the City of Cape Town, while the greatest number of international visitors 223, were from the United States.

Figure 3: Municipal Origins of Domestic Visitors to the Garden Route & Klein Karoo, Jan–Jun 2024

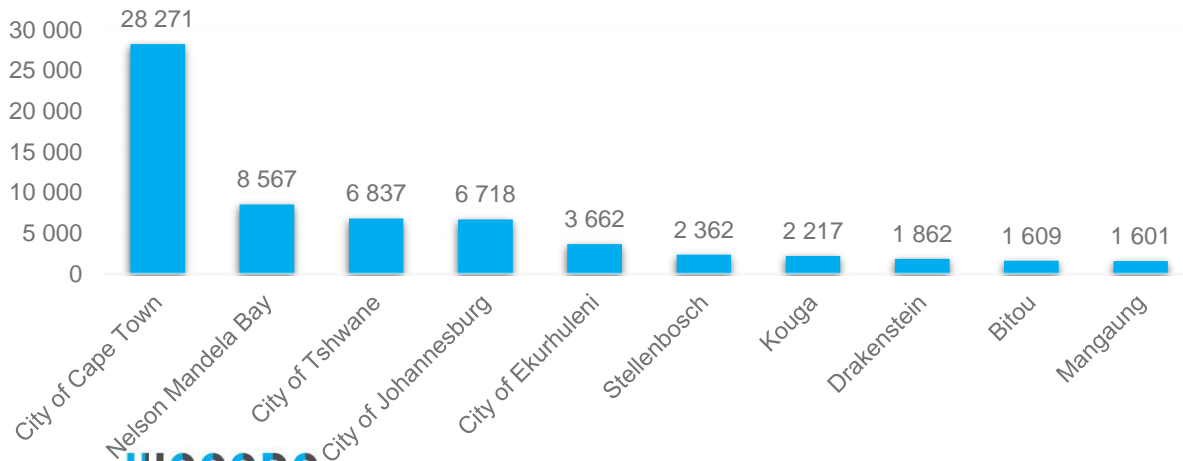
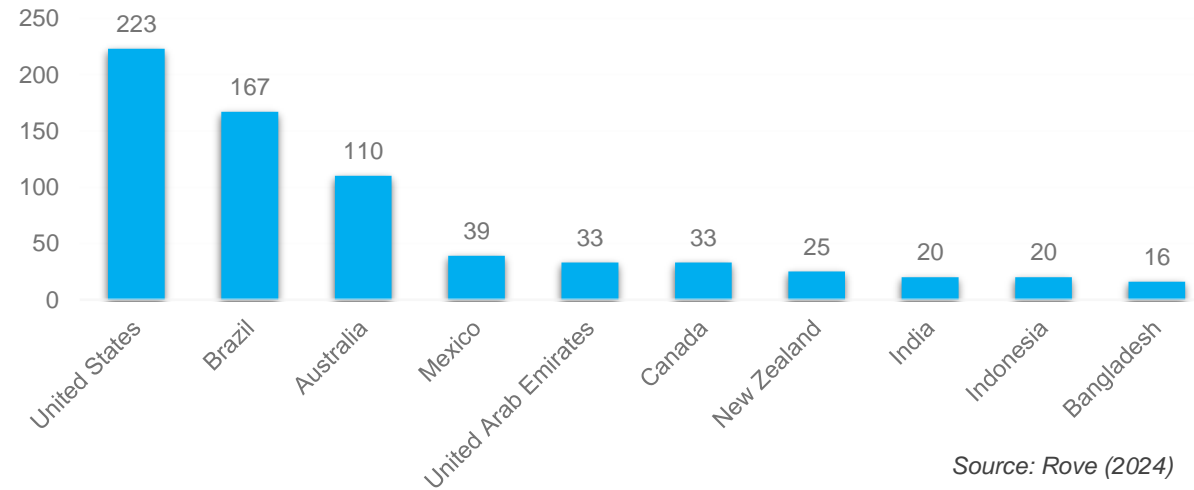


Figure 4: Top 10 International Countries of Origin to the Garden Route & Klein Karoo, Jan–Jun 2024



3. Garden Route & Klein Karoo Visitor Trends

- Figure 5 shows that over 60% of the sampled domestic and international tourists stayed overnight in the Garden Route & Klein Karoo.
- Over 35% of international visitors spent between one and two days in the Garden Route & Klein Karoo, while 34.5% of domestic visitors spent one day in the region. This can be seen in Figure 6.

Figure 5: Percentage of Sample who Stayed Overnight in the Garden Route & Klein Karoo, Jan–Jun 2024

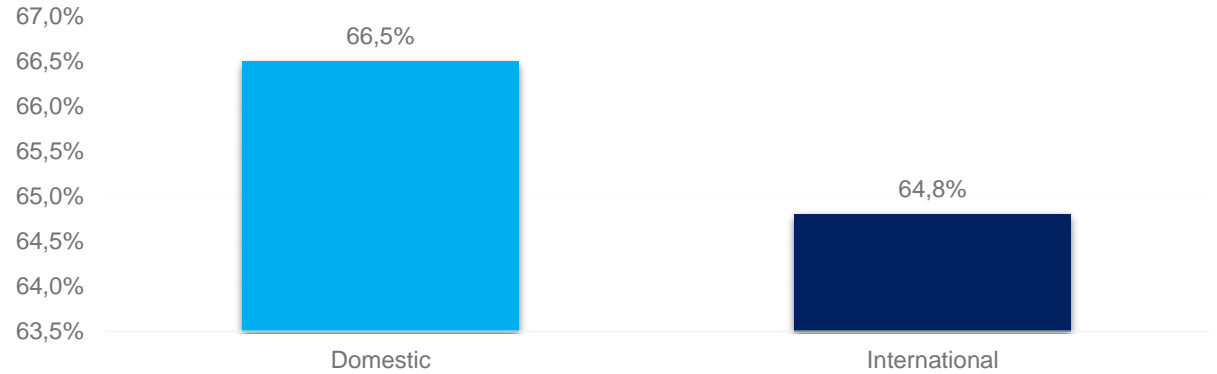
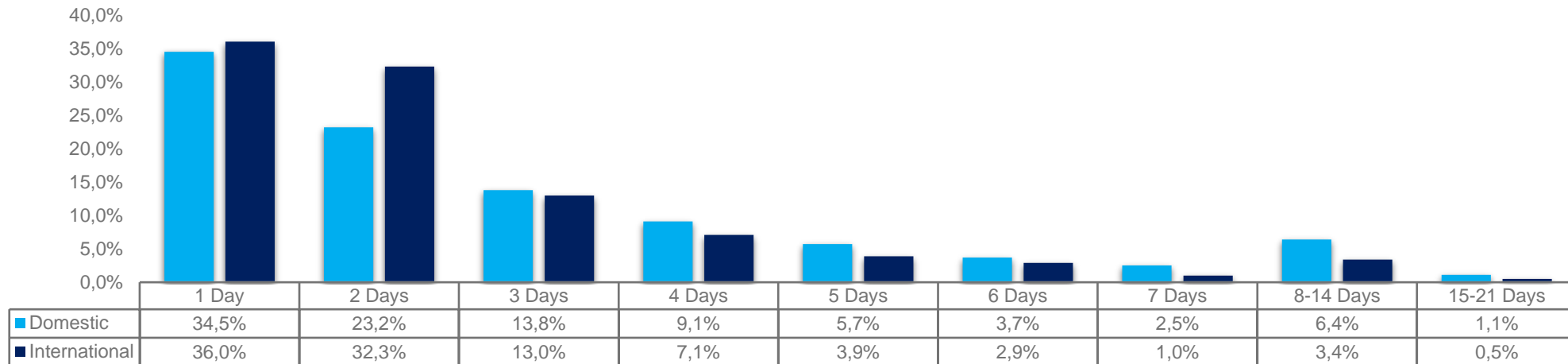


Figure 6: Average Length of Stay for Visitors to the Garden Route & Klein Karoo, Jan–Jun 2024



3. Garden Route & Klein Karoo Visitor Trends

- Figure 7 shows the arrival days for both domestic and international visitors to the Garden Route & Klein Karoo. The most popular arrival days for domestic tourists were Fridays (18.4%) and Saturdays (16.1%), while international tourists enjoyed arriving on Thursdays (15.4%) as well as Saturdays (15.2%).
- Departures from the region were mainly on Sundays (17.4%) and on Mondays (16.8%) from the domestic market with Mondays (16.0%) also being the preferred departure day for international visitors. This can be seen in Figure 8 below.

Figure 7: Popular Arrival Days of the Week for Visitors to the Garden Route & Klein Karoo, Jan–Jun 2024

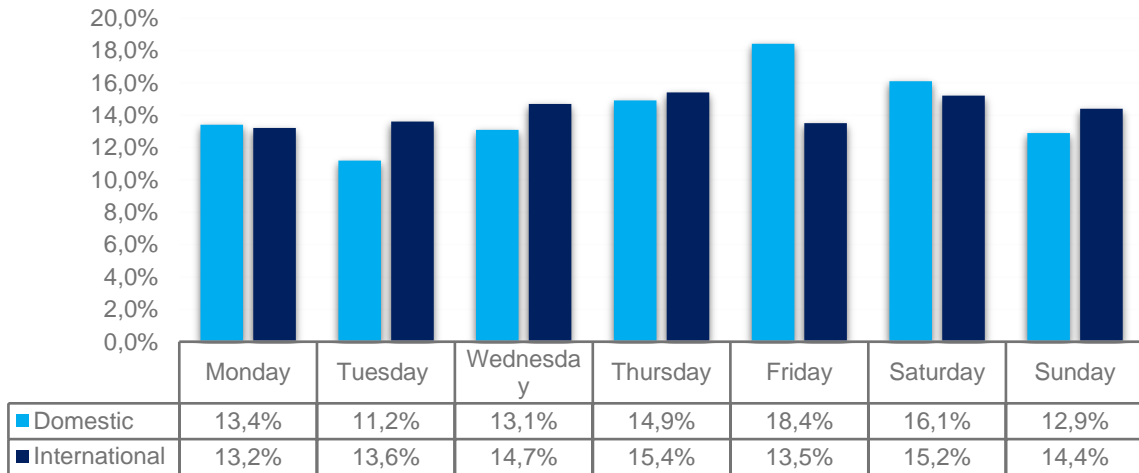
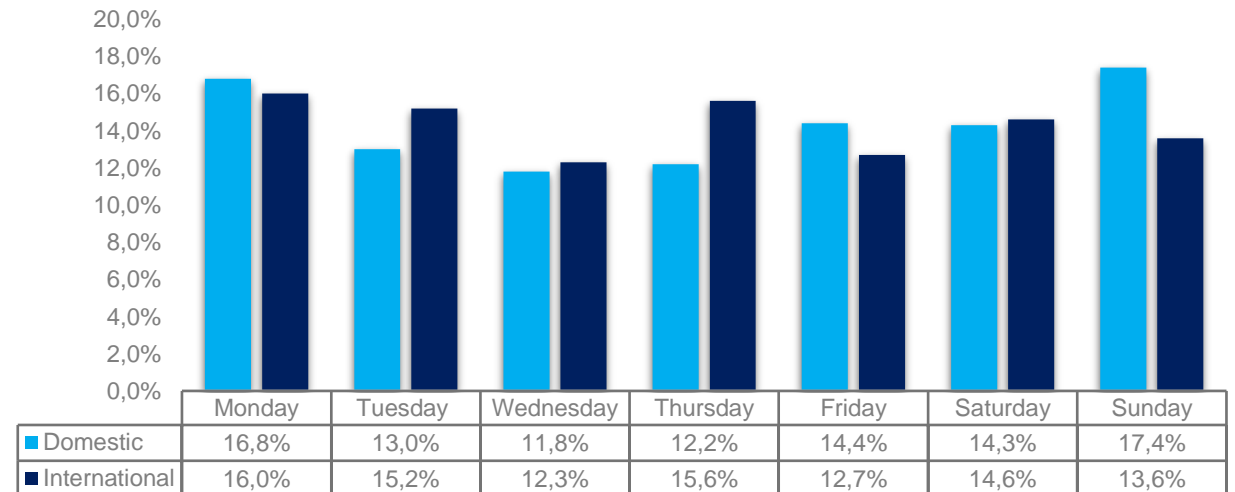


Figure 8: Popular Departure Days of the Week for Visitors to the Garden Route & Klein Karoo, Jan–Jun 2024



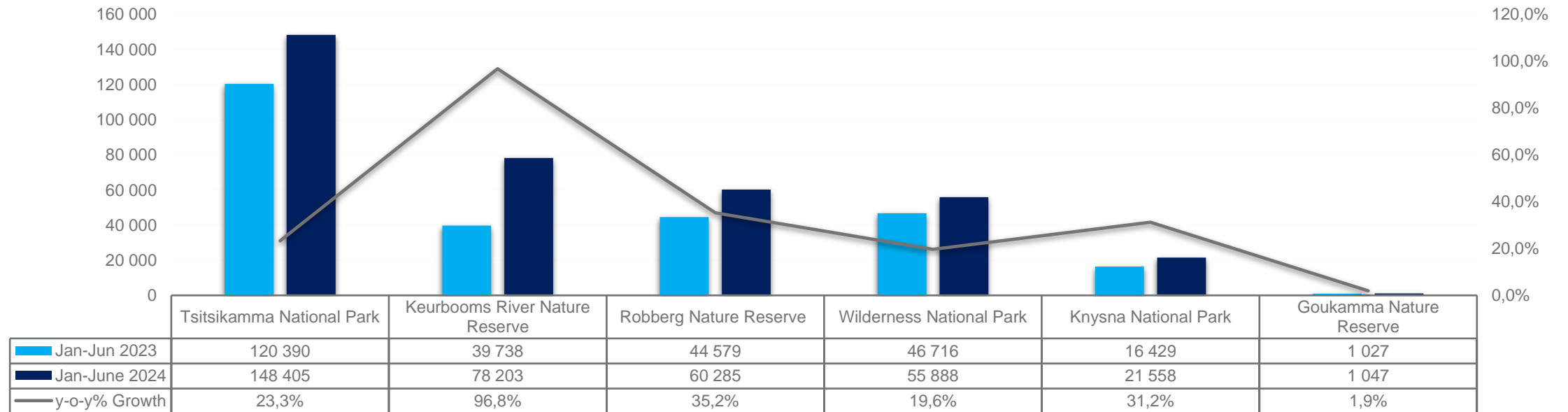
An aerial photograph of a coastline with mountains and the ocean. The mountains are in the background, and the ocean is in the foreground. The sky is clear and blue.

Performance of Garden Route & Klein Karoo Attractions January–June 2024

4. Garden Route & Klein Karoo Attractions

- Along the Garden Route, Tsitsikamma National Park holds the highest share of visitor performance. Between January and June 2024, the national park welcomed 148,405 visitors, which represents a 23.3% growth rate when compared to the same period in 2023.
- Keurbooms River Nature Reserve followed with 78,203 visitor arrivals, showing a remarkable growth of 96.8% when compared to 2023 (Jan–Jun).
- All attractions recorded from the Garden Route and Klein Karoo reflected a positive increase in growth throughout the period under review. This can be seen in Figure 9 below.

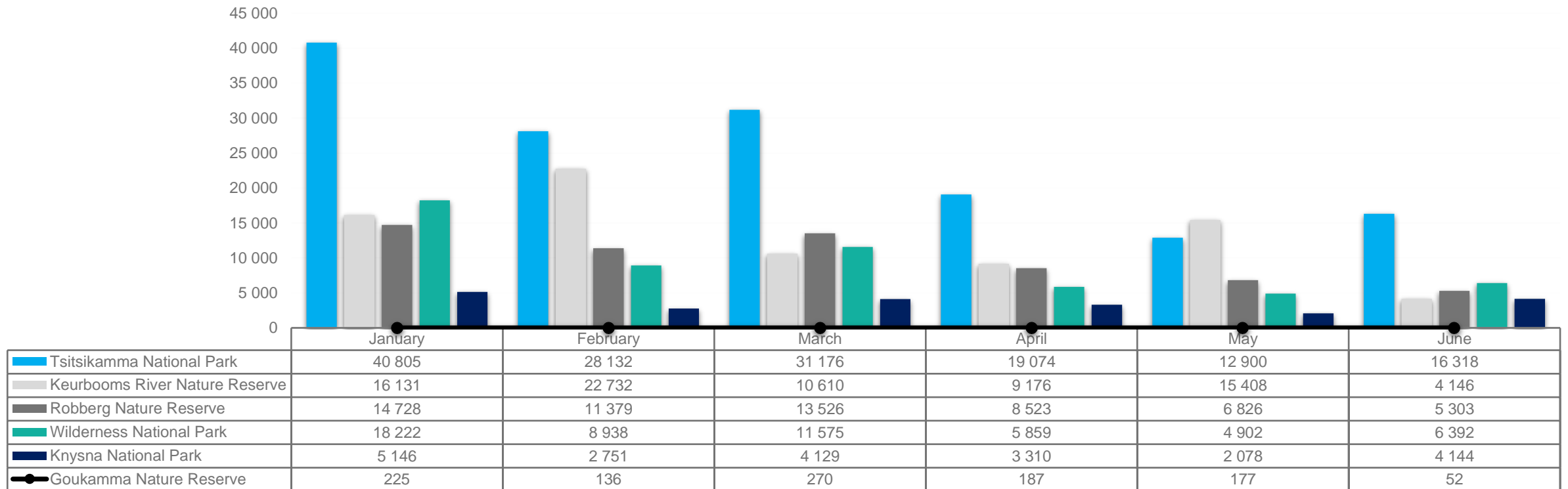
Figure 9: Performance of Garden Route & Klein Karoo Attractions, Jan–Jun 23/24



4. Garden Route & Klein Karoo Attractions

- Throughout the review period, most tourists visited the attractions during the sunny months of January to March 2024. There was a fluctuation in visitor numbers over the three months, with a decline in February. However, all attractions experienced an increase in visitor arrivals in March, which coincides with the first quarter school holidays.

Figure 10: Visitors to Participating Garden Route & Klein Karoo Attractions, Jan–Jun 2024



An aerial photograph of a coastline with mountains and the ocean. The mountains are in the background, and the ocean is in the foreground. The text is overlaid on the image.

Appendix: ROVE Mobile Location Data Key Terms and Definitions

Definitions of Mobile Location Data and Tourists vs non-Tourists

- About Mobile Location Data
 - Privacy compliant data is collected from location-enabled apps on mobile devices. Data is collected when those location-enabled mobile devices enter our geo-fenced areas.
 - Data is collected through applications (news, weather, games, texting apps, traffic, etc).
 - Year-over-year numbers could be skewed by increased app penetration and data privacy settings/policies.
 - The exception is China which does not share data...
 - Think of mobile data like survey data on steroids.
 - A sample size greater than 30 yields a 95% level of confidence.
 - This may be the largest sample size of data pertaining to visitors•
 - This should not be compared to visitation data.•
 - Many factors impact total sample size:
 - Number of app partnerships
 - Usage of apps
 - App developer policies
 - Volume of visitors
- Who Are Tourists?
 - A tourist is typically defined as follows:
 - A visitor who does not live or work within the study geography
 - A visitor who travels a minimum distance to the study geography
 - A visitor who appears in the study geography for a minimum period of time (exclude commuters/passers through, etc.)

Source: Rove (2024)

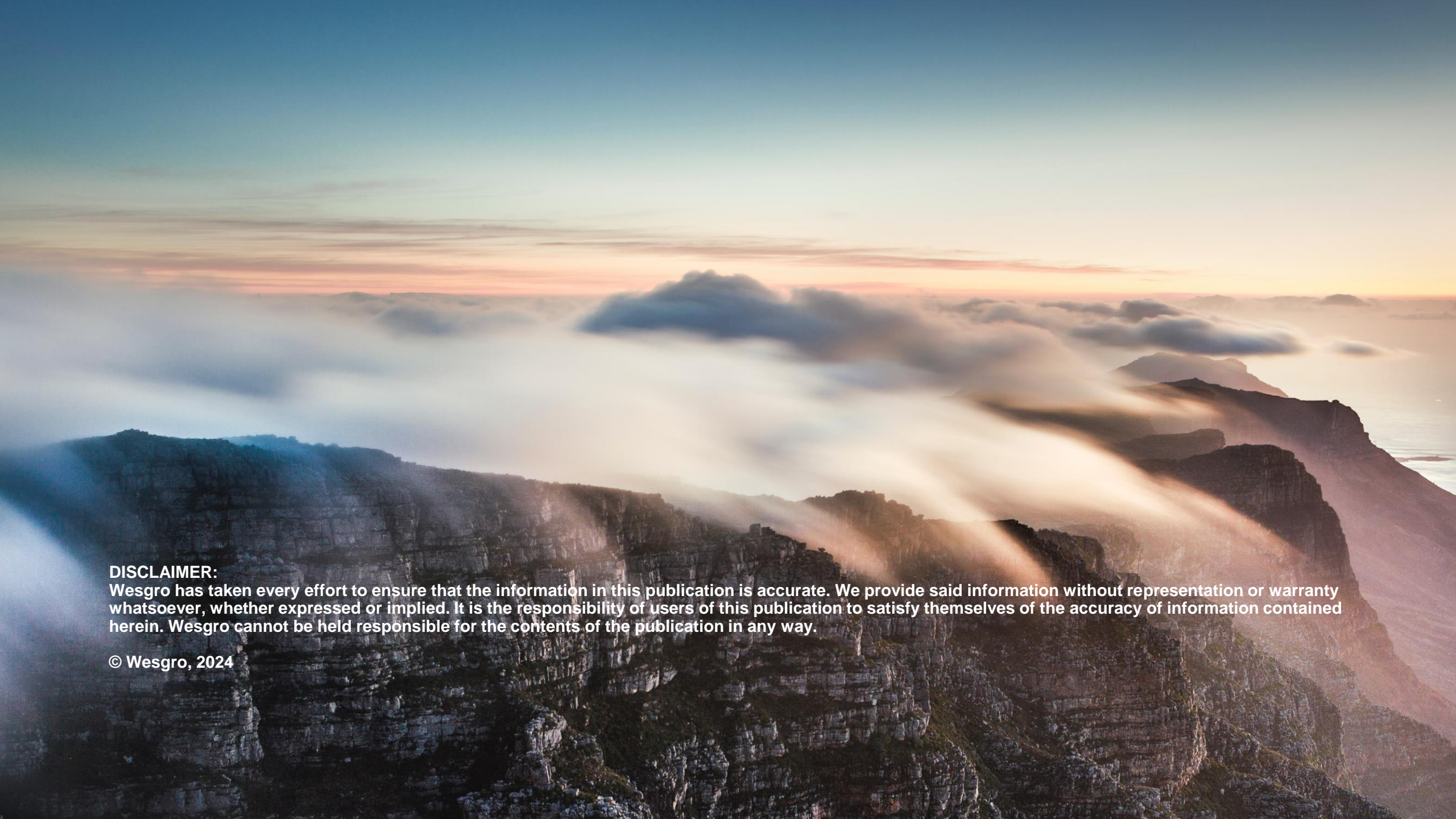
Definitions of Mobile Location Data and Tourists vs non-Tourists

Primary Study Geography		Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have travelled more than 25 miles (40km), and they have stayed in the polygon for more than 120 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of the Western Cape are not counted as a tourists Minimum distance travelled to meet the definition of tourist. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre of the polygon Minimum duration of visit of 120 minutes excludes commuters driving through each region 		
Secondary Study Geography		Tourists are defined as:
City or Town	When a visitor does not live or work in the city or town and they have travelled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of a city are not counted as tourists to the city Minimum distance traveled of 40km satisfies tourist definition for minimum distance travelled. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre of the polygon 		
Point of Interest Study Geography		Tourists are defined as:
All Tourism Experiences	When a visitor stays in the polygon for more than 15 minutes and has not visited the polygon more than 20 times in any 90 day period, they are a tourist	
Notes and Considerations: <ul style="list-style-type: none"> Any 90-day period refers to any consecutive 90 days in their mobile location data history Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.). 		
What are Tourist Segments?		
<ul style="list-style-type: none"> Local Tourists: Tourists who reside within the same region. Domestic Tourists: Tourists who reside in South Africa outside of the Western Cape International Tourists: Tourists who reside outside of South Africa 		

Glossary of Key Terms

Term	Definition and Usage
Study Geography	A specific geography, defined by a boundary called a polygon.
Primary Study Geography	The largest area in the destination in which you want to capture mobile device data. For most destinations this is usually a country, province, or state.
Secondary Study Geography	Often destinations want to derive insights about sub-geographies within their destination, such as counties, tourism regions, and city regions.
Point of Interest	Points of interest are the smallest study geographies in your destination such as tourism businesses, parks, roadways, or city districts.
Sample	Not all people carry GPS-enabled, opted in mobile devices with location services always activated. Thus, in any period of time, in any given study geography, mobile location data is a sample. Therefore, whenever this whitepaper discusses “visitors” or “tourists” or “residents” or any other grouping of devices, it should always be understood to be a sampling of real-world visitorship or foot traffic.
Visitors	Mobile devices seen within the study geography during a specific period of time
Common Evening Location (CEL)	Derived latitude-longitude point near which a device spends most of its time on evenings and/or weekends. While most often associated with a device’s home, there is nothing that inherently guarantees that it is a home (e.g. a person who works an overnight shift at a power plant).
Common Daytime Location (CDL)	Derived latitude-longitude point near which a device spends most of its traditional workweek [Monday to Friday, 8am to 6pm local time]. While most often associated with a device’s office or work location, there is nothing that inherently guarantees that it is an office or work location (e.g. a person who is a stay-at-home parent).
Residents/Workers/Locals	Terms referring to a visitor segment comprising devices which are determined to have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography. For most tourism analyses, these devices are eliminated from the project because they are not, by definition, tourists. However, it is possible to include these devices within a broader visitor study.
Tourists	Term generally referring to a visitor segment comprising devices which are determined NOT to have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography but have come to the study geography from a different origin market.
Tourist Segments	Groupings of tourist segments which have a defining characteristic associated with their appearance in a study geography, such as “Short Haul Tourists” or “International Tourists” or “In State Tourists.”
Overnighters	Term which characterises a specific visitor segment where mobile devices are seen in the study geography for more than one consecutive day. An overnight stay is defined as tourists who arrived prior to midnight (0:00) and stayed until 07:00 the following day.
Day Trippers	Term which characterises a specific visitor segment where mobile devices are seen in the study geography for less than one day.
Length of Stay	Duration of trip within the study geography. The methodology for calculating length of stay is based on the characteristics of the geography.

Source: Rove (2024)



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